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DOMESTIC TRACKING SURVEY

WAVE 1

WINTER 81/82 CAMPAIGN

CONDUCTED BY THE CANADIAN GALLUP POLL LTD.

REPORT PREPARED BY

TOURISM MARKETING INFORMATION SERVICES

July, 1982

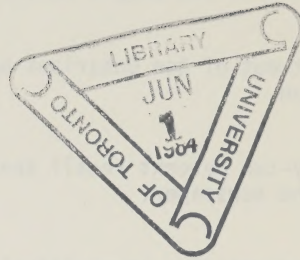
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HIGHLIGHTS

1. The day of the people's choice has been decided.
2. The day of the people's choice has been decided.
3. The day of the people's choice has been decided.
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10. The day of the people's choice has been decided.

HIGHLIGHTS






IMPORTANT PROFILES *

	<u>Aware of Ontario Advertising (Aided/Unaided)</u>	<u>Slogan Awareness</u>	<u>Insert Awareness</u>	<u>Intention to Travel In Ontario March - May, 1982</u>
Age	30 years & over	Under 50 years	30 - 49 years	Under 50 years
Sex	-	-	-	-
Education	High school or higher	High school or higher	High school or higher	High school or higher
Income	\$25 M plus	\$15 M plus	\$25 M plus	\$25 M plus
Children in household	-	Single, no children	-	Children present
Region	Other Ontario (Not Toronto)	Toronto	-	-
Aware of Advertising		Aware	-	Aware
Aware of Booklet	-	Aware		-
Aware of Slogan	-		-	Aware

* The subgroups indicated above are more likely to have seen the specified components of the campaign or to be travelling in Ontario, than any other subgroups. A (-) indicates there is no differentiation amongst the demographic/awareness subgroups.

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BACKGROUND AND OBJECTIVES

This report is the first volume of a two-part research project designed to monitor the effectiveness of the Ministry's efforts to improve administrative management.

The administrative system, which is the focus of this study, comprises various and varied activities carried out by the Ministry in the "Public Service" sector. The first report of the project was submitted in January 1982. The full report of the study, which is a 50-page document, contains a detailed description of the administrative system and its various components. This report is the first of a series of reports which will be published in the near future.

Specifically, the objectives of this study are to identify the main areas of administrative management in the Ministry.

BACKGROUND AND OBJECTIVES METHODOLOGY

- (i) description of the administrative system in the Ministry
- (ii) identification of the main areas of administrative management in the Ministry
- (iii) identification of the main areas of administrative management in the Ministry
- (iv) identification of the main areas of administrative management in the Ministry
- (v) identification of the main areas of administrative management in the Ministry
- (vi) identification of the main areas of administrative management in the Ministry

The first volume of the study will also contain a detailed description of the administrative system in the Ministry. The second volume will contain a detailed description of the main areas of administrative management in the Ministry. The third volume will contain a detailed description of the main areas of administrative management in the Ministry. The fourth volume will contain a detailed description of the main areas of administrative management in the Ministry. The fifth volume will contain a detailed description of the main areas of administrative management in the Ministry. The sixth volume will contain a detailed description of the main areas of administrative management in the Ministry.

BACKGROUND AND OBJECTIVES

This report is the first wave of a four part research program designed to monitor the effectiveness of the Ministry's "Yours to Discover" advertising campaign.

This advertising campaign, which is run twice yearly, promotes tourism and travel in Ontario centering around the "Yours to Discover" theme. The most recent portion of the campaign was conducted in January 1982. The main thrust of the advertising was a 40 page colour newspaper insert run in Ontario daily newspapers. Newspaper and magazine ads were also employed as well as some radio spots.

Specifically, the objectives of this tracking study are to provide measures of . . .

- i) awareness of advertising for vacation travel in Ontario
- ii) recall of media used in advertising for vacation travel in Ontario
- iii) awareness of the "Yours to Discover" slogan
- iv) recall of the "Yours to Discover" newspaper insert
- v) attitudes towards Ontario as a vacation destination
- vi) intention to travel in Ontario in the next three months

This first wave and other future waves will also be compared with previous research studies conducted by the Ministry during the summer of 1980 and winter of 1981. Although the methodology and question format is somewhat different in these previous studies, comparison will be made with this wave wherever possible.

METHODOLOGY

In total, 410 adults in Ontario, 18 years of age and over were interviewed by telephone from Gallup's central telephone facility in Toronto. Interviewing took place in the evenings and on week-ends from February 18 to February 22, 1982. Two call-backs were made to households where there was no answer or a busy signal.

The sample was designed to produce a random sample of respondents in Ontario 18 years of age and over. Telephone numbers were obtained by adding a constant digit to numbers of respondents interviewed in a recent Gallup Ontario Omnibus study. * This ensures a sample stratified by community size and region. Pre-determined quotas for age and sex resulted in a sample of Ontario residents balanced to Statistics Canada data for Ontario by age, sex, region and community size.

The Canadian Gallup Poll is confident that the sample is representative of Ontario residents 18 years of age and over.

The questionnaire was structured within the framework of the study objectives. It was also designed to maximize comparability with previous similar studies.

The questionnaire for this study was pretested by telephone with 10 respondents in Toronto. A copy of the questionnaire is appended to this report.

* A detailed outline of the Ontario Omnibus Sample design is appended to this report.

RESEARCH RESULTS

SOURCE OF VACATION IDEAS

Friends/relatives was the source of vacation ideas most often mentioned by Ontario residents (34%). Newspapers (28%) were the second most frequently mentioned source, including both newspaper advertisements and articles such as are found in the travel sections of the newspaper. Television (12%) and travel agents (11%) ranked next. About fifteen percent could not specify any external source.

Newspapers are a more important source of ideas in the Metro Toronto area than they are outside that region. As one would expect, more people who report newspapers as a source of ideas are aware of the insert booklet.

AWARENESS OF ONTARIO ADVERTISING

Spontaneous Awareness of Travel Advertising

Eighty-five percent of people can spontaneously name at least one vacation destination for which they have seen advertising. This is contrasted with only 38% who could do so when asked during the summer testing. This is to be expected considering the increase in vacation advertising which is typical of the winter months and the high degree of interest in "getting away from it all" during our cold winters.

As was the case in the previous test period, the southern sun spots received the highest mentions, including Bahamas (51%), Florida (50%) and Hawaii (17%). Ontario and New York were mentioned about equally (5 and 6% respectively).

Total Awareness of Ontario Advertising

When those people who did not spontaneously mention Ontario are asked whether they recall any vacation advertising, awareness increases to 50%. Awareness does not differ between Metro Toronto residents and the rest of the province; however awareness is significantly lower for younger residents (under 30 years), and those with less schooling (public school or less).

AWARENESS OF ONTARIO ADVERTISING

Source of Vacation Advertising

Once again, T.V. received the greatest number of mentions (46%) as being the source of the vacation advertising, despite the fact that T.V. was not used during the winter campaign. This may reflect a confusion of media sources which has been noted in prior research, as well as a confusion of the time frame. Although, no T.V. was used in the winter campaign, Ontario was promoted heavily on that medium in the summer and it may be this that respondents are recalling.

Newspapers (36%), insert (25%) and radio were the other media sources mentioned.

SLOGAN AWARENESS

Top of mind awareness of the "Yours to Discover" slogan increased slightly from 2% last winter to 4% in the winter of 1982. Total awareness also increased from 79 to 82%. At the same time, awareness of the "I Love New York" slogan rose from 81 to 87% after having been constant over the past two years. It may be that there is a point where slogan awareness stabilizes for a period before it can rise any further. Any further rise will probably always be minimal since awareness is at such a high point already. It would seem that the "Yours to Discover" slogan is at such a stabilization point since it has remained fairly constant over the past test periods. However, it should be pointed out, that continued advertising is necessary to maintain this high level of awareness.

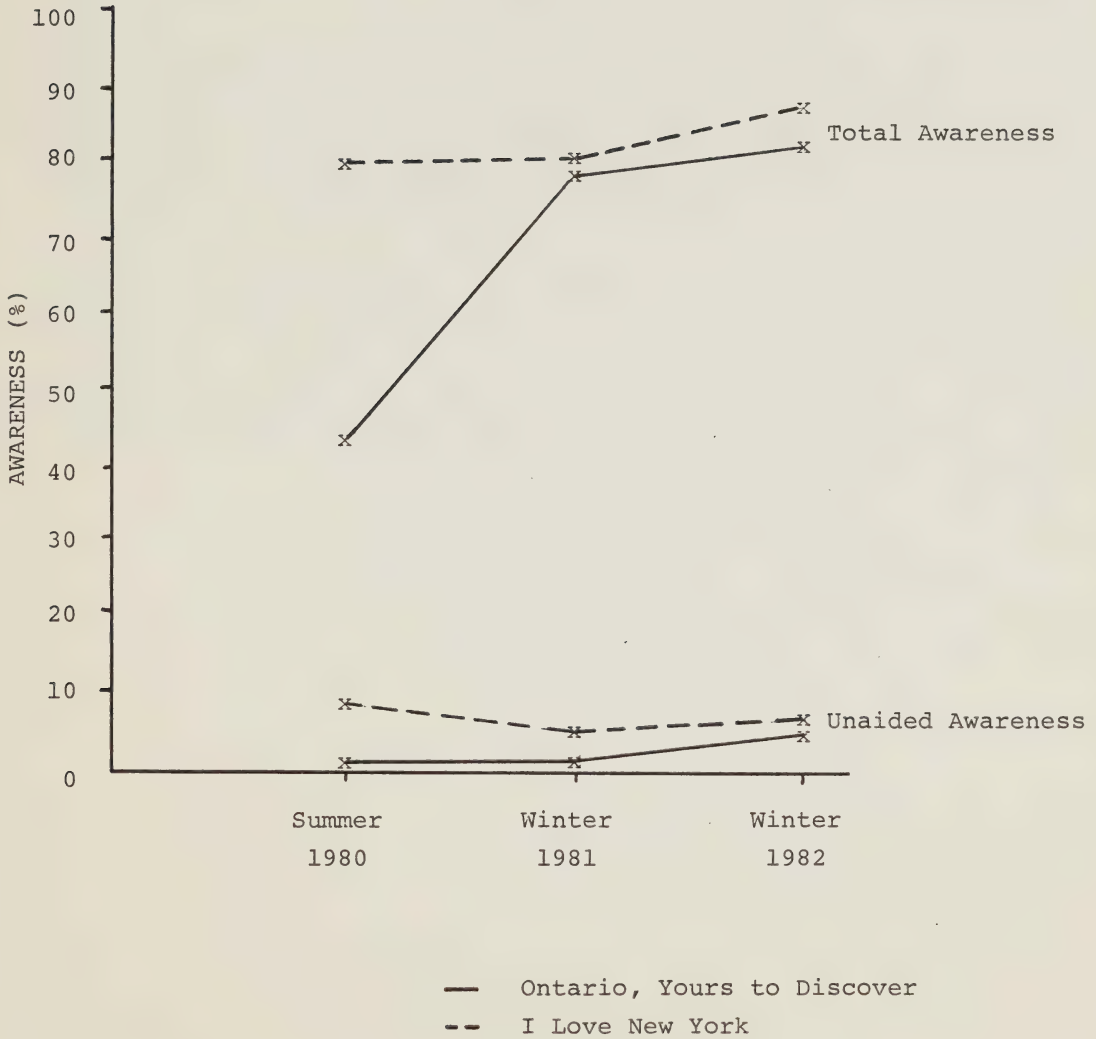
Awareness of both slogans is higher in the Metro Toronto region. As well, there is a tendency for awareness to decrease as respondents increase in age.

Figure 1 tracks awareness of the slogan over the campaign.

An interesting phenomenon comes to light under examination of the demographic characteristics of those who are aware and unaware of these two slogans. In both cases, i.e. "I Love New York" and "Yours to Discover" slogans, males and females are equally likely to recall the slogan. Age however, appears to be negatively correlated with awareness, i.e. the older one gets, the less likely one is to be aware of the slogan. Education on the other hand, is positively correlated with awareness. Income has a less graduated effect; those with incomes over fifteen thousand are more likely to be aware than the lower income group, although there is no difference within the higher income grouping.

Perhaps related to this, is the finding, that, as one might expect, those who are aware of the insert are also more likely to be aware of the slogan.

FIGURE 1
ONTARIO, YOURS TO DISCOVER SLOGAN AWARENESS
(Unaided and Total Awareness)



This is reasonable, in view of the fact that the insert is a vehicle for slogan dissemination. However, it is more difficult to explain why those who are aware of Ontario's insert, are also more likely to be aware of the "I Love New York" and "So Much To Go For" slogans.

One explanation may be that all three campaigns are aimed at the same markets and thus all choose the same range of media vehicles to convey their themes. This general pattern of slogan awareness therefore may be a result of an underlying common variable, media habits, which permeates this group of consumers who tend to be more aware of slogans.

AWARENESS OF "YOURS TO DISCOVER" BOOKLET

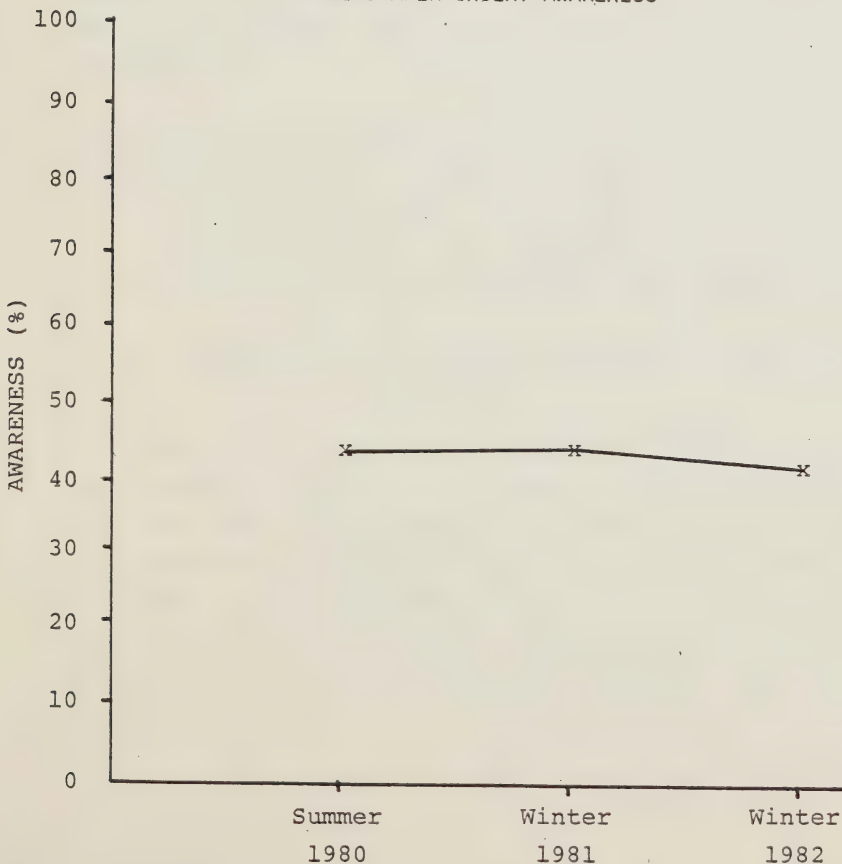
Respondents were asked if they recalled seeing the "Yours to Discover" booklet which was carried in newspapers across Ontario one weekend in mid-January. Over 4-in-10 (42%) recalled the insert booklet. This compares closely with the results of previous studies, despite a reduction in number of copies distributed resulting from the elimination of one of Toronto's three major papers. The level of recall was 44% in each of the past two studies.

Level of awareness of the booklet increases noticeably as household income rises. Awareness ranges from 69% in the highest income category (\$40,000 or more) to 25% in the lowest (under \$15,000).

A higher level of recall is found among 30-49 year olds (51%) than among older (38%) or younger (36%) respondents.

Figure 2 summarizes awareness of the insert throughout the campaign.

FIGURE 2
NEWSPAPER INSERT AWARENESS



ATTITUDE STATEMENTS

Respondents were asked to indicate whether they agreed or disagreed with a series of attitude statements concerning vacationing in Ontario.

(1) "ONTARIO IS NOT A VERY INTERESTING PLACE TO SPEND A HOLIDAY".

Eighty-eight percent of Ontarians disagreed with this statement indicating that they believe Ontario is an interesting place to spend a holiday. Those who are familiar with the "Yours to Discover" campaign are more likely to feel that Ontario is an interesting place (93%) than those who are not (78%).

(2) "ONTARIO IS A FUN AND EXCITING PLACE TO SPEND YOUR HOLIDAYS".

Further indication that the campaign is succeeding in dispelling Ontario's "dullsville" image, is the fact that more people who are aware of the campaign (86%) agree with this statement than those who are unaware (80%).

Within the population however, certain segments are less likely to agree with this statement. Residents of Metro Toronto are less likely to believe the province is a fun place to vacation as are those with a university education. The presence of children in a household does not appear to influence agreement with this statement.

(3) "AN ONTARIO VACATION REPRESENTS GOOD VALUE FOR YOUR MONEY".

Three quarters of the population believe that Ontario is a good value. Interestingly, it seems that the insert is the one medium which conveys this idea. This may be a result of the package section of the insert. Also interesting, is the fact that significantly more females than males agree with this statement. Happily, the campaign appears to be reaching one of its prime markets, the mid-income range since this group shows considerably more agreement than either the low or high end of the income scale.

- (4) "GENERALLY SPEAKING, INFORMATION ON TRAVEL IN ONTARIO IS NOT VERY EASY TO OBTAIN."

Generally, it is felt that information is readily available with six out of ten people disagreeing with this statement. This is equally true for residents of Metro Toronto and for those living outside the city. Surprisingly, however, as level of education increases, so does one's tendency to agree with the statement, indicating difficulty in obtaining information. Also difficult to explain is the fact that awareness of Ontario's advertising does not differentiate response to this question. In other words, those who are aware and those who are not aware of Ontario's advertising are equally as likely to disagree with this statement. It may be that people are not aware of the specific advertising but are aware that there are various channels of disseminating information.

INTENTION TO TRAVEL IN ONTARIO

Twenty-five percent of Ontarians plan to take a pleasure trip in Ontario where they will stay in commercial accommodations within the three months following the survey (approximately March to May).

Most likely to be planning such a trip are those people under fifty years old, those with an annual household income over \$25,000 and households with children in them. People who are aware of Ontario's advertising are more likely to plan such a trip than those who are unaware.

APPENDIX A
SAMPLE DESIGN

APPENDIX A

THE DESIGN OF THE SAMPLE

The Gallup Ontario Omnibus maintains a modified probability sample in all centres over 1,000 in population. A quota sample is used in rural farm and rural non-farm centres. An independent sample of individuals is selected for each survey.

The sampling procedure is designed to produce an approximation of the adult civilian population, 18 years and older, living in Ontario except for those persons in institutions such as prisons or hospitals, or those residing in far Northern regions. Survey data can be applied to this population for the purpose of projecting percentages into numbers of people.

The sample design incorporates stratification by six community size groups, based on the 1976 Census data: cities of 500,000 population and over, those between 100,000 and 500,000, 30,000 to 100,000, 10,000 to 30,000, 1,000 to 10,000 and rural farm and rural non-farm areas.

The population is arrayed in geographic order by community size and within those classifications, by census enumeration areas. Enumeration areas, on the average, contain about 500 to 600 people.

A total of 105 enumeration areas are selected randomly from this array. Within urban centres, a random block sampling procedure is used to select starting points for interviewers. The interviewer is provided with a map of the enumeration area, showing the location of the starting point and is required to follow a specified route in the selection of households. Within the household, the youngest male, 18 years and over, at home at the time of the interview is questioned. If there is no male available, or when the male quota is completed, the youngest available female, 18 years and over is interviewed.

The selection of rural farm and rural non-farm interviewing locations follows the sample design established for urban centres in terms of geographic dispersion and random selection of enumeration areas. Because of the low population density and wide dispersion of households, the random block sampling procedure is replaced by quota sampling based on sex and age.

The design of the Gallup Poll sample has been based on population statistics of the Census of Canada, 1976.

APPENDIX B
QUESTIONNAIRE

VACATION STUDY

Good...I'm.....from the Gallup Poll. We are conducting a study and we'd like to include your opinions in our survey.

i) INTERVIEWER: ASK TO SPEAK WITH:

- youngest male 18 years of age or over, living at home -
IF NOT AT HOME ASK:
- youngest female 18 years of age or over, living at home -
IF NOT AT HOME ASK:
- second youngest male, 18 and over, living at home -
IF NOT AT HOME ASK:
- etc. 3rd, 4th youngest in this manner.

INTERVIEWER: REINTRODUCE YOURSELF IF NECESSARY

1. Generally speaking, where do you, yourself usually get ideas on where to go for a vacation or a weekend trip? DO NOT READ LIST.

MAGAZINES-----1 14-
 NEWSPAPERS-----2 15-
 BOOKLET/SUPPLEMENT IN NEWSPAPER---3 16-
 TRAVEL BROCHURES-----4 17-
 T.V.-----5 18-
 RADIO-----6 19-
 TRAVEL AGENT-----7 20-
 FROM FRIENDS/RELATIVES-----8 21-
 OTHER -----9 22-
 I ALWAYS GO TO VISIT FRIENDS/RELATIVES-----1 23-
 DON'T KNOW-----2 24-

- 2 For which destinations or places, if any, have you seen or heard advertising related to travel or vacations in the past three months? RECORD 1ST MENTION IN "1ST" COLUMN AND ALL OTHER MENTIONS IN "OTHER" COLUMN. PROBE: What others?

		1ST MENTION	OTHER MENTIONS
CANADA	ATLANTIC PROVINCES-----	1 25-	1 27-
	QUEBEC-----	2	2
	ONTARIO-----	3	3
	MANITOBA-----	4	4 30-
	SASKATCHEWAN-----	5	5
	ALBERTA-----	6	6
	B.C.-----	7	7 33-
	OTHER CANADA (SPECIFY)-----	8	8
U.S.A.	* CANADA-----	9	9
	FLORIDA-----	1 26-	1 36-
	MICHIGAN-----	2	2
	NEW YORK-----	3	3
OTHER	OTHER U.S.A. (SPECIFY)-----	4	4 39-
	BAHAMAS/CARRIBEAN-----	5	5
	EUROPE-----	6	6
	OTHER (SPECIFY)-----	7	7 42-
	NONE/NO OTHERS-----	8	8 43-

* IF "CANADA" ASK:

Was this advertising for Canada itself, or for a specific place within Canada?

CANADA-----1 +-
 PLACE WITHIN CANADA-----2

IF "PLACE WITHIN CANADA", ASK:
 Which place would that be?

RECODE ANSWER IN Q.2

IF "ONTARIO" MENTIONED, SKIP TO Q.4

IF "ONTARIO" NOT MENTIONED, ASK:

3. In the past three months, have you yourself seen or heard any advertising for vacation travel in the Province of Ontario?

YES-----1 - GO TO Q.4

45-

NO-----2

DON'T KNOW-----3

- SKIP TO Q.5.

IF SAW/HEARD ADS FOR ONTARIO, ASK:

4. Where did you see or hear the advertising for Ontario vacations? PROBE: Anywhere else? DO NOT READ LIST.

* BROCHURES -----1

46-

** MAGAZINES -----2

47-

*** NEWSPAPERS -----3

48-

BOOKLET/SUPPLEMENT IN NEWSPAPER-----4

49-

RADIO-----5

50-

T.V.-----6

51-

BILLBOARDS-----7

52-

TRAVEL AGENCIES-----8

53-

OTHER (SPECIFY) _____

9

54-

DON'T REMEMBER-----0

55-

* IF "BROCHURES" ASK:

You mentioned brochures. Where did you see the brochures?

IN NEWSPAPER-----1

56-

OTHER-----2

** IF "MAGAZINES" ASK:

You mentioned magazines. Was this an ad in a magazine or was it a magazine in the newspaper?

AD IN MAGAZINE-----1

57-

MAG. IN NEWSPAPER-----2

*** IF "NEWSPAPERS" ASK:

You mentioned newspapers. Was this an ad in the newspaper itself or was it a booklet in the newspaper?

AD-----1

58-

BOOKLET-----2

ASK EVERYONE:

- 5a. In advertising, slogans or catchy phrases are often used. For example, "It's better in the Bahamas" is a slogan currently used in the travel industry. What other slogans or phrases related to travel and vacations have you seen or heard? PROBE: Are there any other travel slogans you can recall? DO NOT READ LIST.

0.5a	Q.5b.		
	YES	NO	
* Ontario - Yours to Discover----	1	2	3 59 -
✓ I Love New York-----	1	2	3 60 -
* So much to go for-----	1	2	3 61 -
FRIENDLY MANITOBA -----	1		62 -
STAMP AROUND ALBERTA-----	1		63 -
SUPER NATURAL-----	1		64 -
OTHER(SPECIFY)-----	1		65 -

NONE-----	1		66 -

FOR EACH * SLOGAN NOT MENTIONED. ASK:

- b. Have you seen or heard the slogan _____? ROTATE ORDER STARTING WITH "✓"

ASK EVERYONE:

6. As you may or may not be aware, in mid-January, weekend newspapers in Ontario carried an insert booklet titled "Ontario - Yours to Discover." This forty-page booklet outlined places to visit and things to do in Ontario this winter. Do you recall seeing this booklet, or not?
- | | | |
|-----------------|---|------|
| YES----- | 1 | 67 - |
| NO----- | 2 | |
| DON'T KNOW----- | 3 | |
7. Now I'd like to know whether you agree or disagree with the following statements. First of all, - (READ STATEMENT) ROTATE STARTING WITH "✓". Do you agree or disagree with this statement?
- | | AGREE | DISAGREE | DON'T KNOW | |
|---|-------|----------|------------|------|
| a) Ontario is a fun and exciting place to spend your holidays----- | 1 | 2 | 3 | 68 - |
| b) Generally speaking, information on travel in Ontario is <u>not</u> very easy to obtain---- | 1 | 2 | 3 | 69 - |
| c) There's something for everyone to do in Ontario on a vacation----- | 1 | 2 | 3 | 70 - |
| d) Ontario is <u>not</u> a very interesting place to spend a holiday----- | 1 | 2 | 3 | 71 - |
| ✓ e) An Ontario vacation represents good value for your money----- | 1 | 2 | 3 | 72 - |
8. Thinking of the next 3 months, do you think you will take any pleasure trips in Ontario where you will stay overnight in commercial accommodations?
- | | | |
|-----------------|---|------|
| YES----- | 1 | 73 - |
| NO----- | 2 | |
| DON'T KNOW----- | 3 | |

BASIC DATA

Now I'd like to ask you some additional questions so that we can classify our data.

1. Which of the following age categories are you in? READ LIST.

18-29 years-----1 76-
30-49 years-----2
50 years & over-----3

2. RECORD IF:

MALE-----1 75-
FEMALE-----2

3. What is the last level of education you have completed? DO NOT READ LIST.

SOME PUBLIC SCHOOL-----1 76-
COMPLETED PUBLIC SCHOOL-----2
SOME SECONDARY SCHOOL-----3
COMPLETED SECONDARY SCHOOL-----4

SOME COMMUNITY COLLEGE-----5
COMPLETED COMMUNITY COLLEGE-----6
SOME UNIVERSITY-----7
COMPLETED UNIVERSITY-----8
OTHER (SPECIFY)-----9

4. What is your marital status? Are you single, married, divorced, separated or widowed?

SINGLE-----1 - SKIP TO Q.6. 77-
MARRIED-----2
DIVORCED/SEPARATED/WIDOWED-----3

5. Are there any children under 14 years of age living in your household?

YES-----1 78-
NO-----2

6. Finally, what was your total household income from all sources for 1981 before tax deductions? Would it be over or under \$25,000 per year?

Under \$25,000----- ()	Over \$25,000----- () 79-
Is that-----?	Is that-----?
Under \$15,000-----1	\$25,000 - \$40,000-----3
or \$15,000 - \$25,000-----2	or \$40,000 and over-----4
REFUSED-----5	
DON'T KNOW-----6	

LENGTH OF INTERVIEW: _____ 80-

NAME OF RESPONDENT: _____

ADDRESS: _____

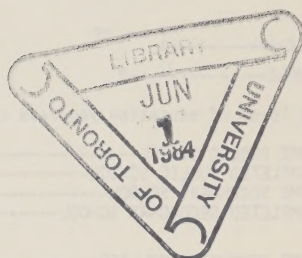
CITY: _____

DATE OF INTERVIEW: _____

TELEPHONE: _____

I HEREBY ATTEST THAT THIS IS A TRUE AND HONEST INTERVIEW

(INTERVIEWER'S SIGNATURE)



3 1761 11546430 7